

## How to Find Expiring ONAs in eXPRS

### CMEs

(updated 12/7/2021)

To assist Case Management Entities (CMEs) in making sure that the individuals they coordinate services for maintain continuity of care, CMEs can search for Oregon Needs Assessments (ONAs) that are ending or due to expire. Doing so will enable CMEs to keep track of ONAs that are due to be completed again and prevent loss of the individual’s Medicaid eligibility due to ONA lapse/gaps.

### To find expiring ONAs:

1. Log in to eXPRS. If you have multiple **Organization/Program Area** log in options, be sure to select the correct one, as shown below.

CDDPs – select “**Case Management Provider (Provider)**”

**Login**

<b>Login Name:</b>	<input type="text" value="userID"/>
<b>Password:</b>	<input type="password" value="••••••••"/>
<b>Organization/Program Area:</b>	<input type="text" value="CME Case Management Provider (Provider)"/> ▾
<input type="button" value="Submit"/>	

Brokerages – select “**Case Mgmt Prov (Provider)**”

**Login**

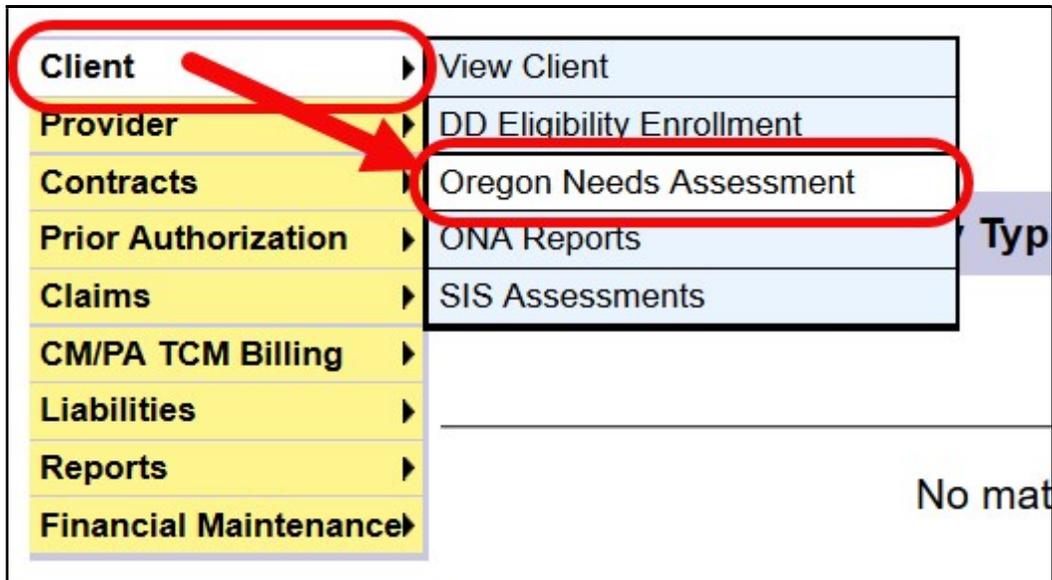
<b>Login Name:</b>	<input type="text" value="user ID"/>
<b>Password:</b>	<input type="password" value="••••••••"/>
<b>Organization/Program Area:</b>	<input type="text" value="BROKERAGE /Case Mgmt Prov (Provider)"/> ▾
<input type="button" value="Submit"/>	

State Kids services – select “**State CM (Provider)**”

**Login**

<b>Login Name:</b>	<input type="text" value="userID"/>
<b>Password:</b>	<input type="password" value="••••••••"/>
<b>Organization/Program Area:</b>	<input type="text" value="State CM (Provider)"/> ▾
<input type="button" value="Submit"/>	

2. From the yellow, left-hand menu, click on **Client** → **Oregon Needs Assessment**.



3. In the **Find Oregon Needs Assessment** page, search for your expiring ONAs by using the criteria:

- **ONA Expiration Date From** = report start date
- **ONA Expiration Date To** = report end date
  - **Pro Tip**: Search using a date range large enough and including future dates to return expiring ONAs in the future to give ample time to schedule a new assessment or ISP team meetings, as needed.
- **Display Format** = Expiration Report columns

Click **Find** to search.

A screenshot of the 'Find Oregon Needs Assessment' search form. The form contains several input fields: Assessment ID, Client Prime, Status, County, Service Setting, ONA Submit Date From, ONA Submit Date To, ONA Expiration Date From (5/1/2021), ONA Expiration Date To (6/30/2021), LOC Status, Current Individuals Only (checked), and Max Displayed (25). The 'ONA Expiration Date From' and 'ONA Expiration Date To' fields are highlighted with a red circle. The 'Display format' dropdown menu is open, showing options: Default columns, Expiration Report columns (selected), and SG Score columns. A red arrow points to the 'Find' button at the bottom of the form.

- Any ONAs with end/expiration dates that fall within the **ONA Expiration Date From/To** date range used will return below. Export your results list to an Excel spreadsheet and save the file.

ID	Status	Prime	Client Name	County	Birthday	Age	Service Setting	ONA Submit Date	ONA Expiration Date	Assessor Name	Service Coord./Personal Agent
2****7	Approved	xyz0000a	VADER, ELLA		m/d/1965	55	Other	6/23/2020	6/30/2021	Assessor Name	SC/PA Name
2****5	Approved	xyz0000b	BAYCON, CHRIS P		m/d/2015	6	Children's In-Home Services (SE151)	6/19/2020	6/30/2021	Assessor Name	SC/PA Name
2****1-1	Approved	xyz0000c	THYME, JUSTIN		m/d/2007	14	Children's In-Home Services (SE151)	6/24/2020	6/30/2021	Assessor Name	SC/PA Name

- Now return to the **Find Oregon Needs Assessment** page and pull a second list to see if any of the individuals with expired ONAs returned in #3 above have had a new ONA completed/submitted.

Search using this suggested criteria:

- ONA Submit Date From** = the first day of the month **PRIOR** (ex: 4/1/2021) to the date used for ONA Expiration Date From (ex: 5/1/2021) in #3 above.
- ONA Submit Date To** = the same date used for the ONA Expiration Date To in #3 above (ex: 6/30/2021).

Click **Find** to search.

- When the results list returns for this search, export the new list to an Excel spreadsheet and save the file.

**Find Oregon Needs Assessment**  
At least one search criteria must be entered.

Assessment ID:   
Client Prime:    
Status:    
County:    
Service Setting:    
ONa Submit Date From:   ONa Submit Date To:    
ONa Expiration Date From:   ONa Expiration Date To:    
LOC Status:    
Current Individuals Only:   
Max Displayed:    
Display format:  

Export options:  CSV |  Excel |  PDF |  RTF

ID	Status	Prime	Client Name	County	Service Setting	ONa Submit Date	ONa Expiration Date	Assessor	LOC	Risk Report
2*****7-1	Approved	xyz0000e	BOATMAN, FISHER		Children's In-Home Services (SE151)	5/13/2021	5/31/2022	Assessor Name	Approved	

- Now copy/paste the data rows from one of the two Excel spreadsheets into the other. You may need to add a couple of new columns to accommodate all the data from both spreadsheets together. Once combined and saved, you can sort or filter the new combined list to see who of the Expired ONA list ***does not have*** a new ONA that has been submitted to ***approved*** status. These are the individuals who need new ONAs completed.